



Filing ID #10024251

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Stephen M. Perenich
Status: Congressional Candidate
State/District: FL12

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 07/30/2018
Period Covered: 01/01/2017– 07/2/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Residential Rental Property-10 Shamrock [RP] LOCATION: Oldsmar, FL, US		None	Capital Gains, Rent	\$15,001 - \$50,000	\$5,001 - \$15,000
Residential Rental Property-340 Woods Landing [RP] LOCATION: Oldsmar, FL, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
Roth IRA ⇒ American Century [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Roth IRA ⇒ Blackrock Global [MF]		\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000
Roth IRA ⇒ JHFunds 2 Total Return NAV [MF]		\$1,001 - \$15,000	Capital Gains	None	\$1 - \$200
Roth IRA ⇒ JHVIT Core Bond NAV [MF]		\$1,001 - \$15,000	Capital Gains	None	\$1 - \$200
Roth IRA ⇒		\$1,001 - \$15,000	Capital Gains	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JHVIT New Income NAV [MF]					
Roth IRA ⇒ JHVIT Select Bond NAV [MF]		\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000
Roth IRA ⇒ JHVIT Strategic Equity Allocation NAV [MF]		\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000
Shoe Suspension Patents [IP]		Undetermined	None		
Traditional IRA [IH]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
U.P. Agency Inc., 8% Interest [OL] LOCATION: Lake Orion, MI, US DESCRIPTION: Sale of Finance and Insurance related to car sales at a dealership.	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Altus Consulting	Salary	\$11,675.81	\$10,500.05

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Capital One	October 2017 - December 2017	Credit Card	\$15,001 - \$50,000
JT	Pentagon Federal Credit Union	November - December 2017	Personal Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☒ Yes ☐ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Stephen M. Perenich , 07/30/2018